

# STATE OF INDIANA

DEPARTMENT OF LOCAL GOVERNMENT FINANCE



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TO: All Elected Assessing Officials, their Employees and Vendors

FROM: Carol L. Johns, Training Director

DATE: July 20, 2009

SUBJECT: Indiana Chapter of IAAO Courses for 3<sup>rd</sup> and 4<sup>th</sup> Quarter

The Department of Local Government Finance (DLGF) in conjunction with the Indiana Chapter of the International Association of Assessing Officers (ICIAAO) will sponsor IAAO courses as a continuing education offer to all assessing officials.

The DLGF will pay the registration fees for **two employees** from each Township or County to attend these sessions. Eligible registrants are County Assessors and/or Deputies, Elected Township Assessors who survived the referendum and/or their Deputies, County Auditors and appointed members of the PTABOA. All others (vendors or non-elected individuals) must submit a check for \$375.00 **once they have a confirmed seat in the class.**

In order for the DLGF to pay the registration, registrants must sign both an AM and PM sign in sheet and take the exam at the end of the course. Successful completion of the exam is not a requirement. **Those who do not attend the entire course or do not take the exam will be responsible for payment of the registration fee to ICIAAO. Anyone who registers for the course and cancels within ten days of the class\* or who does not attend any part of the course, without specific approval from ICIAAO, will also be responsible for payment of the registration fee. This provision has not previously been enforced, but starting with the first quarter classes, it will be. \*Emergency situations will be taken into consideration, and if there is a waitlist and the spot can be filled, no fee will be charged to the person cancelling.**

Registration will be on a first-come, first-serve basis and will be held to a maximum of 50 people and a minimum of 25 people. **No on-site registration will be accepted. This has also not been enforced previously, but it will be with the start of the regular first quarter classes.**

**A minimum of 25 people must be registered for a class to be held. If we do not have 25 people ten days before the start date of the class, the class will be cancelled and you will be notified by e-mail.**

## COURSE OFFERINGS

The following courses will be offered during the 3<sup>rd</sup> & 4<sup>th</sup> quarter of 2009:

**Course 151, USPAP: - September 1-3, County Assessors Conference, Indianapolis (Randy Scheidt, scheduled instructor)** An additional USPAP class will be held later in the fall. **Date and location will be determined and posted to the web.** Course 151 USPAP is a workshop covering materials from The Appraisal Foundation, Uniform Standards of Professional Appraisal Practice which includes: Definitions, Preamble, Ethics Rule, Competency Rule, Departure Rule, Jurisdictional Exception Rule, Supplemental Standards Rule, and Standards 1 through 10. Supplementary materials include The Appraisal Foundation Uniform Standards of Professional Appraisal Practice (USPAP). This workshop includes an exam. **IAAO recertification credit: 15 hours-2 days**

**Course 402: - Property Tax Policy – October 5 through 9, Ivy Tech, Indianapolis, Rick Stuart, scheduled instructor.** Course 402 offers students' strategies for assisting in the effective formulation and implementation of tax policies and presents background enabling students to understand the context under which property tax policy is established.

**Course 300: Fundamentals of Mass Appraisal – October 19 through 23, Seymour, location to be determined. (Larry Ellis, scheduled instructor\*)** Course 300 provides an introduction to mass appraisal. Topics covered include single-property appraisal versus mass appraisal, components of a mass appraisal system, data requirements and analysis, introduction to statistics, use of ratio studies and the selection of a mass appraisal system.

**Course 101: - Fundamentals of Real Property Appraisal – November 2 through 6, Ivy Tech, Indianapolis, Ft. Benjamin Harrison, (Rick Stuart, scheduled instructor\*).** Course 101 is a basic appraisal course for assessors. It emphasizes the theory and techniques of the cost and sales comparison approaches to value. Students review terminology, basic appraisal and economic principles, general principles of land valuation, the assessment function, and the mass appraisal process.

**Course 102: - Income Approach to Valuation – November 16 through 20, Indianapolis Ivy Tech, Ft. Benjamin Harrison (Marion Johnson, scheduled instructor\*)** Course 102 covers the theory and techniques of estimating value by the income, or capitalized earnings, approach. The material includes selection of capitalization rates, analysis of income and expenses to estimate operating income, and capitalization methods and techniques. The course also covers rental units of comparison, as well as real estate finance and investment. Recommended: Course 101, PAV/PAAA

**Course 400: Assessment Administration – November 30 through December 4, Valparaiso Ivy Tech, (Ginny Whipple, scheduled instructor\*)** Course 400 covers administrative concepts and procedures that can produce greater efficiency in the modern assessor's office. Topics include information systems, reappraisal, setting goals, appeals, public relations, personnel, budgeting, ratio studies, evaluations and data processing.

**\*The instructors shown have been scheduled for the classes. However, due to weather conditions, personal matters, job commitments and other things that may come up at the time, these instructors are not guaranteed.**

## **TIMES**

Classes will begin promptly at 8:00 AM and end at 5:00 PM (local time at the class site). On Friday, the examination will begin at 8:00 AM and end at 12:00 PM.

## **OVERNIGHT LODGING**

The DLGF will not be responsible for overnight lodging reservations. The registrant shall take total responsibility for his/her own arrangements.

## **PER DIEM**

In accordance with the rules promulgated by the DLGF governing the payment of travel expenses associated with approved training sessions, a township assessor (and their deputies), a county assessor (and deputies), a county auditor or a PTABOA member who attends this session is entitled to receive a mileage allowance and the per diem as set by the county in which the official resides, under the travel rules of the county\*. A person is entitled to a round trip mileage allowance only for travel between the person's place of work and the training site nearest to the person's place of work. Claims are to be paid, without regard to appropriation, from either the county general or cumulative reassessment fund.

\*If a county does not have an approved travel policy, the participant's reimbursement will be governed by the travel rules of the State of Indiana in effect at that time.

## **REGISTRATION**

**On-site registrations will not be accepted!** Please complete a copy of the attached registration form for all individuals who plan to attend each class. All registration forms **MUST BE POSTMARKED or FAXED** no later than two weeks prior to the class. **Please check the individual registration forms for deadlines for each class.** The class will be filled on a first-come, first-serve basis with the fax time stamp or postmark used to determine the class roster. Once a class is filled (50 people maximum), registrants will be placed on a waitlist. The position on the waitlist will be determined by the time stamp on the fax or the postmark on the envelope.

## **REGISTRATION FEE**

Registration for the class is **THREE HUNDRED AND SEVENTY-FIVE DOLLARS (\$375.00)**. Registrants who qualify for DLGF payment DO NOT include payment for registration. All others (vendors) must include payment at the time they are confirmed in the class. Checks should be made out to: Indiana Chapter of IAAO or ICIAAO.

## **SPREAD THE WORD**

In an effort to provide all members of the assessing community with the opportunity to receive this information, please share the contents of this notification with your **entire** staff as well as your county PTABOA (Property Tax Assessment Board of Appeals) members and the elected Township Assessors who survived the referendum.

### **3<sup>rd</sup> & 4<sup>th</sup> QUARTER REGISTRATION FORM**

Please register me for the following classes:

<b>Course Name and Number</b>	<b>Location</b>	<b>Date</b>	<b>Register</b>
Course 151 USPAP	Assessor Conf, Indianapolis	Sept.1 - 3	<b>FULL</b>

**Class Full as of 7-10-09**

Course 402 Property Tax Policy	Ivy Tech, Indianapolis	Oct 5 - 9	
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**Registration deadline for the Oct 5 – 9 Class is Sept 23, 2009**

Course 300 Fundamentals of Mass Appraisal	Seymour	Oct 19 - 23	
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**Registration deadline for the Oct 19<sup>th</sup> class is Oct 5, 2009**

Course 101 Fundamentals of Real Property Appraisal	Ivy Tech, Indianapolis	Nov 2 - 6	
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**Registration deadline for the Nov 6<sup>th</sup> class is Oct 19, 2009**

Course 102 Income Approach to Valuation	Ivy Tech, Indianapolis	Nov 16 - 20	
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**Registration deadline for the Nov 16<sup>th</sup> class is Nov 2, 2009**

Course 400 Assessment Administration	Ivy Tech, Valparaiso	Nov 30 - Dec 4	
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**Registration deadline for the Nov 30 class is Nov 16, 2009**

**Name:** \_\_\_\_\_

**County:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City, State, Zip:** \_\_\_\_\_

**Phone: (H):** \_\_\_\_\_ **(B):** \_\_\_\_\_ **(C):** \_\_\_\_\_

**E-Mail Address:** \_\_\_\_\_

**Title :** \_\_\_\_\_

**Vendor: Yes** \_\_\_\_\_ **Name of Company:** \_\_\_\_\_

Fax or mail this form to:

Donna Bratcher

Department of Local Government Finance

100 North Senate Avenue, Room N-1058

Indianapolis, IN 46204

Fax: 317/232-8779

## **Directions to the Class Sites**

### **FORT BENJAMIN HARRISON//LAWRENCE CAMPUS:**

From I-465, take the 56<sup>th</sup> Street Exit (either direction). Take 56<sup>th</sup> Street east to Post Road. Turn left (north) onto Post Road. Turn right on East 59<sup>th</sup> Street. The Richard M. Fairbanks Center for Health Professions will be on the right side of East 59<sup>th</sup> Street. This is where the classes will be held.

Parking is available for visitors in the north lot, off of East 59<sup>th</sup> Street. Please do not park in the student parking area.

**Smoking is not permitted inside the building or on the grounds of any IVY TECH campus.**

### **VALPARAISO, 2401 VALLEY DRIVE:**

From US 30, turn onto South Washington Street and travel approximately 1.9 miles. Turn right onto East Glendale Boulevard and then left on N. Valparaiso Street. Go approximately 0.2 miles and turn right onto Wall Street, then turn left on Valley Drive.

**Seymour location undetermined. Check Web at a later date.**